

# IT Initiative Supplement

April 25, 2010

## I. Project Description

**Project Title:** Next Phase of Orion

**Brief Description of the Project Title:** Next Phase of Orion

**Statewide Priority:**

**Agency Priority:**

**Estimated Completion Date:** June 30, 2013

**IT Project Biennium:**

**Request Number:**

**Version:**

**Agency Number:** 5801

**Agency Name:** Revenue

**Program Number:**

**Program Name:**

**A. Type of Project (check all that apply)**

**Enhancement X**

**Replacement**

**New**

**O&M**

**B. Type of System (check all that apply)**

**Mid-Tier x**

**Mainframe**

**GIS**

**Web x**

**Network**

**Desktop x**

## II. Narrative

**C. Executive Summary**

The Department of Revenue (DOR) would like to provide additional functionality to Orion that may not be covered in the Maintenance and Support contract with our vendor Tyler Technologies. This phase would include functionality to extend better service to local government, make the valuation process more accurate, timely, and taxpayer friendly, and would better support the tax and revenue administration between the state tax system and the property tax system.

**Project Purpose and Objectives:** This request would provide for better and more timely service to local governments through a more thoroughly automated certification of values process and better service to, and communication with taxpayers through online services for submitting information to the department. The efficiencies realized in the Property Assessment Division would accommodate the future growth of parcels in the state and minimize the need to increase staff.

**Technical Implementation Approach:** Determine any additional hardware/software needs; continue researching web services

**Project Schedule and Milestones:** Begin July 1, 2011 and end June 30, 2013

**D. Business and IT Problems Addressed**

These services will result in more efficient processing and improve the quality of services provided to citizens of Montana, and ease the burden of complying with tax regulation.

**E. Alternative(s)**

**Alternatives Considered:**

None as this is a COTS product

**Rationale for Selection of Particular Alternative:**

**F. Narrative Detail**

## III. Costs

**G. Estimated Cost of Project:**

1. **Personnel Services – IT Staff:**
2. **Personnel Services – Non IT Staff:**
3. **Contracted Services:** \$600,000 for vendor support
4. **ITSD Services:**
5. **Hardware:**
6. **Software:**
7. **Telecommunications:**

**8. Maintenance:**

**9. Project Management:**

**10. IV&V**

**11. Contingency:** 20% of total due to the unknown system functionality needs now and in the future, higher risk - \$120,000

**12. Training:**

**13. Other:**

**Total Estimated Costs:** \$720,000

**Total Funding:**

## **IV. Funding**

### **H. Funding**

**1. Fund:**

**2. Amount:**

**3. Total Costs:**

**Cash/Bonded:**

**Bill Number:**

## **V. Cost upon Completion**

### **1. Operating Costs upon Completion**

**At the time of submittal, these costs are included in the implementation costs - to be determined after further research.**

**FTE:**

**Personal Services Costs:**

**Operating Costs:**

**Maintenance Expenses:**

**Total Estimated Costs:**

**2. Funding Recap**

**Fund Type:**

**Amount:**

**Total Funding:**

## **VI. Risk Assessment**

### **A. Current IT Infrastructure Risks**

1. Current application 10+ years old?

no

Date of last major upgrade? Will be 12/2010

2. Current application is based on old technology?

no

If yes, what is the current hardware platform, operating system, and programming languages used to support the application?

3. Is the agency not capable of maintaining the current application with internal technical staff?

yes

If yes, who supports the application today? The vendors will be responsible to support the hardware and software, training internal staff as needed

4. Other IT infrastructure risks? \_\_\_\_\_

If yes, provide further detail.

### **B. Current Business Risks**

1. What are the risks to the state if the project is not adopted? Slower refund processing; inefficient business process due to being paper based.

2. Does the current application meet current business requirements?

yes

If "no", what specific business functions does the application lack?

### **C. Project Risk Assessment**

1. Describe any major obstacles to successful implementation and discuss how those obstacles will be mitigated.

**Table H Risk Assessment**

<b>Description</b>	<b>Severity (H/M/L)</b>	<b>Probability of Occurrence (%)</b>	<b>Estimated Cost</b>	<b>Mitigation Strategy</b>
<b>ITSD rate model</b>	<b>H</b>			<b>Use current base budget to pay mid-tier charges</b>
<b>Hardware/infrastructure and software estimates may be inaccurate</b>	<b>M</b>			<b>Contingency fund</b>
<b>Staffing availability</b>	<b>H</b>			<b>Reallocate resources to each department priority accordingly; hire contracted staff to assist</b>